

Trusted Advisor Network

Launch 4

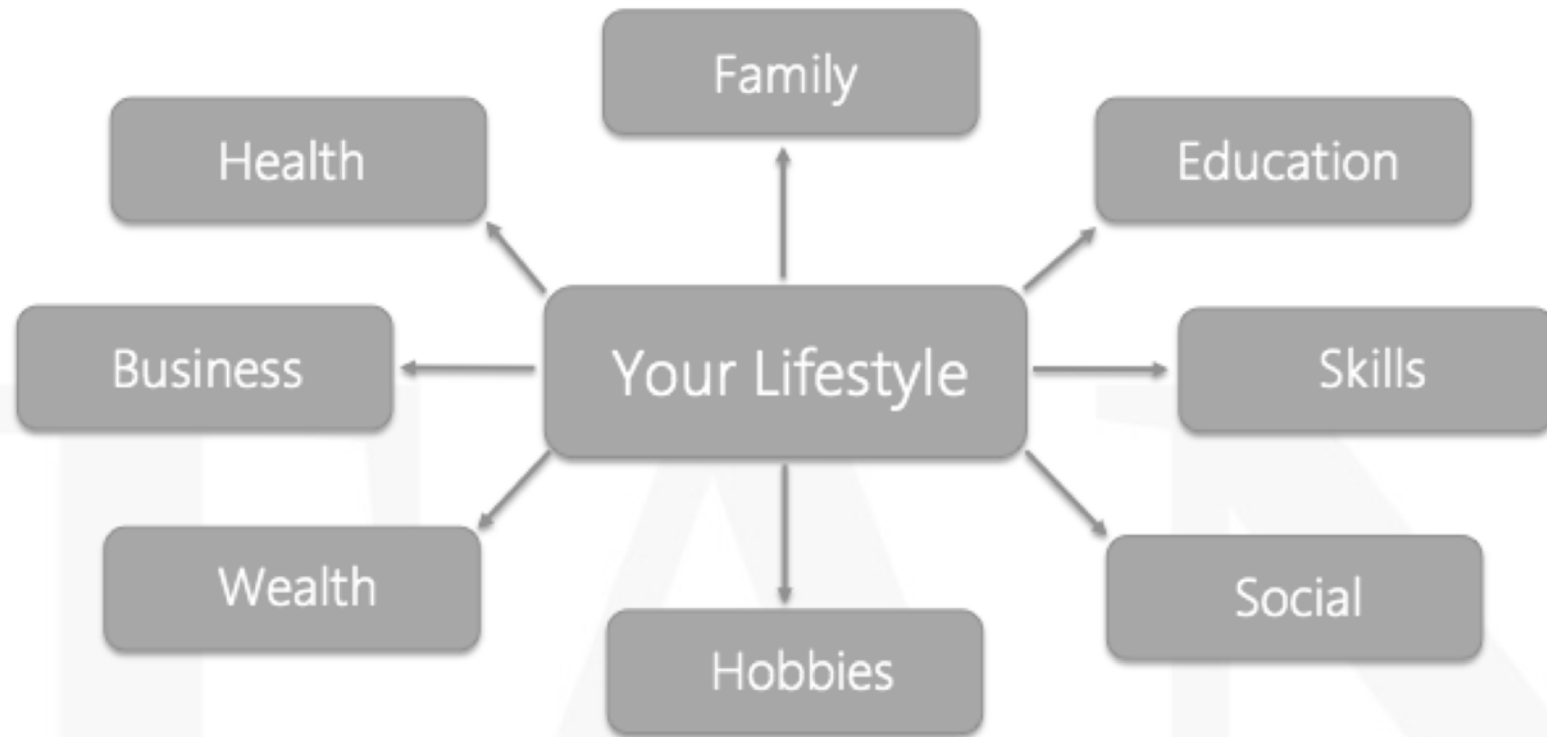
THE INTRO PACK

More Income | More Freedom | More Scale



Living Life Now

Please keep an open mind when going through the next few pages. The prompts are designed to stretch your thinking towards a future situation that may be very different from now. Some of this you may think of as "hopes and dreams" but the point is they are YOUR hopes and dreams. Do your best to record them as openly as possible with what you'd like in terms of 8 areas of your lifestyle... each of them will have requirements for time or money or both. Please fill in your current situation and what you'd like it to be ideally.



Family

Please briefly describe your family situation:

Questions |

What lifestyle would you like to have for you and your family?

Where would you ideally like to live?

What do you ideally want to drive?

Where do you want to take your holidays?

Do you have projects or events that you'd like to see happen?

Notes | Answers

Hobbies

Please briefly describe what you do for fun outside of work:

Questions |

Please briefly describe your current Hobbies:

Are there any activities that you'd like to take up or do more of?

(e.g. golf, fishing, hunting, skiing, diving, bridge, flying, photography, scrap-booking, pilates, genealogy, gardening, travelling etc)

Are there any clubs you'd like to join?

Notes | Answers

Health

Please briefly describe what you have in mind for maintaining your Health:

Questions |

Please briefly explain your current HEALTH situation:

What energy levels do you want to have?

Is there a fitness routine that you'd like to have?

Are there any diet changes that you think could be made?

Are there any health challenges/checkups that need to be worked on?

What is your ideal "healthy mind and body"?

Notes | Answers

Wealth

Please briefly describe what you have in mind for building Wealth:

Questions |

What do you want to earn per annum? (in 12 months, 3 years)

How much do you want your total assets to be worth? (in 12 months, 3 years, 10 years)

What debts/mortgages would you like to have retired and by when?

Any other ambitions you have here?

Notes | Answers

Education

Please briefly describe what you have in mind for developing your knowledge/education:

Questions |

What skills would you like to become better at? (selling, financial, managing, people skills etc)

What new skills would you like to learn?

Are there any book/seminars/courses that you'd like to find or attend on specialist topics of interest?

Are there any "heroes" that you have you'd like to see speaking in person?

Notes | Answers

Skills

Please briefly describe what you have in mind for developing new skills:

Questions |

How many of the following skills would you like to actively improve?

Become better at time management

Become better at making decisions

Be more open to feedback from others

Become more nurturing and encouraging

Be a better listener

Become more assertive

Be more positive and optimistic

Become better at motivating others

Become better at confrontation

Be more disciplined at follow-through

Other skills or values that you'd like to work on...

Notes | Answers

Social

Please briefly describe what you enjoy Socially outside of work:

Questions |

Are there any activities with friends that you'd like to do more of (weekends away, dinners out, entertaining, events, concerts travel etc)?

Do you have extended family that you'd like to have more contact with?

Are you a member of any community organisations that you'd like to contribute more to?

Do you have a contribution to society that you've given thought to?

Notes | Answers

Business Scale

Please describe the Scale and Role you'd like to have for your Business:

Questions |

What scale of business do you want to have (12 months, 3 years, eventually)?

What role do you want for you in your business (manager, technician, salesman, chairman, semi-retired etc)?

Do you have a succession/exit plan in mind

Notes | Answers

Business Goals

Please describe the Goals you have for your Business in terms of Income and Freedom:

Questions |

What net profit should we be targeting (12 months, 3 years, 5 years)?

What do you want your business to be worth (12 months, 3 years, eventually)?

How many hours do you want to be working (12 months, 3 years, eventually)?

Notes | Answers

Business | Projects

Please describe the projects you are currently work on in your business right now:

Notes | Answers

A large grid of small dots for taking notes, covering the majority of the page below the question.

That's It 😊

Thanks for the work you've done here. I'll review your answers so we are both on the same page for what your business needs to be able to fund. This is the first step to finding out more about what it will take to work together in order to achieve the goals you have for your business. Please let me know if I can help with anything in the meantime between now and the time we catch up at our opening session. At our next session you will be taking me through this Prep Pack and building a Launch Plan for what we will work on over the next 90 days together. Please let me know if there is any other information you'd like to let me know about below, otherwise, see you at our next session!

Notes | Other Information